

# APPRAISE

By Evaluation Services, Inc.  
*Makes it Simple!*

*Quick, Accurate, and Economical  
Historical Stock & Bond Valuations  
for Trusts and Estates*

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
June 18, 2024

## Trusts & Estates News

This week's Trust and Estate article is:  
"High Court Estate Tax Ruling Forces  
Succession Planning Revamps"

(Excerpt from actual article):

Estate lawyers will have to reevaluate their options for reducing taxes for family businesses creating succession plans after the US Supreme Court's decision against an estate in its stock valuation dispute with the IRS.

You can read the article by clicking [HERE](#).

Last week's Trust & Estate article was:  
"IRS can tax death benefits used to  
purchase stocks, high court rules"

You can read last week's eNewsletter by clicking [HERE](#).



---

## Helpful Hint

This week's Helpful Hint is:

## "Wed, June 26 Webinar: "Estate & Gift Tax Valuations in the Cloud"

WealthManagement.com recently published an article entitled, The Estate Tax Tech Revolution Is Picking Up Speed. Here is an excerpt from the article: "The integration of technology into estate planning has revolutionized the field, breaking down long-standing barriers."

Have you considered the possibility of preparing estate and gift tax valuations from a website instead of software? If you have, our Wed, June 26 webinar, "Estate & Gift Tax Valuations in the Cloud" may be of interest to you.

Please click [HERE](#) to learn more about this Wed, June 26 webinar.

**Last week's Helpful Hint was:**  
**"How are CUSIP numbers derived?"**  
You can read last week's eNewsletter by clicking [HERE](#).



---

## Weekly Financial Market Review

**Our business resides at the intersection of trust & estate law as well as financial data reporting.**

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



---

## Upcoming Events

(Subject to change - please monitor regularly)

- Wed, Jun 19: We will be closed for the NASDAQ & NYSE Juneteenth holiday. All online services will be available.
- Thu, Jun 20: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



## Is there a better way to prepare your valuations?

Why don't you consider us for your stock

and bond valuations for trusts & estates?  
Maybe there is a better way than how  
you are doing them now?

We've been providing these valuations  
since 1985 and have experience and  
insight. Our pricing universe contains  
millions of US and foreign securities with  
corresponding decades of history. We  
can speak with you to potentially identify ways to improve accuracy, productivity, and  
output.



Click [HERE](#) for a list of valuations we provide and how you can get them.

If you want to speak with us, please:  
call: 201-784-8500 x111  
email: [customerservice@appraisenj.net](mailto:customerservice@appraisenj.net)

## Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in  
this eNewsletter. Please feel free to share it with them. They can then sign up for their  
own subscription by clicking on the link below.

[Sign up for ESI-APPRAISE notifications and weekly eNewsletters](#)

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

Thank you for subscribing and allowing us to serve you.

---

### Evaluation Services, Inc.

180 OLD TAPPAN ROAD,  
BUILDING 4, OLD TAPPAN, NJ  
07675  
(201) 784 8500  
[appraisenj.com](http://appraisenj.com)

Contact  
Us



Evaluation Services, Inc. | 180 OLD TAPPAN ROAD BUILDING 4 | OLD TAPPAN, NJ 07675  
US

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!